

Phoenix Program
Process Definition – General Ledger

Process	<i>Review Organization Budgets</i>
Process Number	<i>BD – 029</i>

Description of Process

The Analyze Controlled Budgets inquire menu options let you review the budget information you enter, including journal entry detail for posted transactions. These panels display changes you make, available balances, current totals, and much more. In a series of inquiry panels, the last panel in the series provides a Print button that enables you to print a report of the journal detail that appears in the lower, scrolling portion of the panel.

Inquiring on an Organizational Budget involves two panels—Available Funds and Journals.

Input to Process

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Output of Process

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Service Level Agreement Required? (if yes, provide a brief description)

N/A

PeopleSoft Panel Groups being Used

Function	Panel Group
Go, Process Financial Information, Analyze Controlled Budgets, Inquire	Organizational Budget

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Business Process Description

Process Description	Responsi bility (Agency/ Centraliz ed)
<p><u>AVAILABLE FUNDS PANEL</u></p> <p>Step 1: Enter Budget Keys</p> <p>Enter the Budget keys for the budget you would like to review or enter your Business Unit and press OK. When you press OK, a list box with all your budgets appear, select from the list the budget you would like to review.</p>	Agency
<p>Step 2: Reviewing Available Funds for an Organization Budget</p> <p>This panel displays segment definition, budgetary control or tracking information, the related appropriation key, and important totals for budgeted and statistical amounts.</p> <p><u>JOURNALS PANEL</u></p> <p>Click the Search button to display detailed information.</p> <p>Click the Print button to print a report of these journals. The report will initially be displayed in a Crystal Application, then if you click the print icon within the Crystal Application the report will print.</p>	Agency

Forms Used with Process (#)

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Process Flow Diagram (if appropriate):

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Process Signoff

Tested By
Date Tested

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AVAILABLE FUNDS PANEL

Analyze Controlled Budgets - Inquire - Organization Budget Inquiry

File Edit View Go Favorites Inquire Report Help

Available Funds Journals

Unit:	Scenario:	Fund:	Org:	Program:	Project/Grant:	Sub-Cls:	BY:	Account:
40100	FINAL	A	4011501000	ALL	01	300	2001	510000
Description: Amendment Number 001								
Related Appropriation								
	FINAL	A	401A15	ALL		300	2001	000000
Attributes								
Control/Track:		Track		<input type="checkbox"/> Temporarily Freeze Budget				
Inquiry Controls								
<input checked="" type="radio"/> YTD Totals		<input type="radio"/> Segment Total		Thru Segment:		4		Periods Per BY: 4
Budgeted Amount:				435,959.00				
- Pre Encumbered Amount:				0.00				
- Encumbered Amount:				0.00				
- Expended Amount:				328,008.41				
Remaining Spending Authority:				107,950.59				
Statistical Budget								
Stat:				UOM:				
Budgeted Units:		0						
Actual Units:		0						
Remaining Units:		0						

FNVOLTST Available Funds Update/Display All

JOURNALS PANEL

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Analyze Controlled Budgets - Inquire - Organization Budget Inquiry

File Edit View Go Favorites Inquire Report Help

Available Funds Journals

Unit:	Scenario:	Fund:	Org:	Program:	Project/Grant:	Sub-Cls:	BY:	Account:
40100	FINAL	A	4011501000	ALL	01	300	2001	510000

Description: Amendment Number 001

Journal Trans Date Segment Monetary Amount Nbr Units Journal Line Description

0000497970			435,959.00		0	A01001
0000497970			0.00		0	A01001
0000497970			0.00		0	A01001
0000497970			0.00		0	A01001

FNVOLTST Journals Update/Display All